



**Lawrence Berkeley National Laboratory
Project Management Office**

PROCEDURE Page

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Number: PMO-1.5

Revision: 0

Effective Date: June 1, 2005

Review Period: 3 years

Supercedes Issues:

Title:

CONTROL ACCOUNT PLAN / WORK AUTHORIZATION

Section where used:

Project Management

Prepared by

Richard Stanton,
Facilities Project Management

Approved by

Jim Krupnick,
Laboratory Project Management Officer

Revision Log:

Rev. No.	Effective Date	Pgs. Affected	Brief Description of Revision

1.0 PURPOSE

The Control Account Plan/Work Authorization defines the authorized scope, budget and schedule for the control account and confirms the agreement between the Control Account Manager (CAM) and the project manager to accomplish this plan and provides authorization to proceed with this work. The Project Manager uses the Control Account Plan/Work Authorization form first to provide planning guidance to the CAMs, and then when planning is completed, to document and delegate work to the CAMs.

2.0 SCOPE

A Control Account Plan/Work Authorization will be prepared for all control accounts on projects using the LBNL Earned Value Management System (EVMS) reporting.

3.0 REFERENCES

DOE Order 413.3.
LBNL Earned Value Management System Description.
PMO Procedure 1.2, Work Breakdown Structure (WBS).
PMO Procedure 1.4, Control Accounts, Work Packages & Planning Packages.

Title

CONTROL ACCOUNT PLAN / WORK AUTHORIZATION

4.0 PROCEDURE

4.1 Development and Assignment

The Project Manager will identify key control points at the intersections of the Work Breakdown Structure (WBS) and Organizational Breakdown Structure (OBS) through the use of a Responsibility Assignment Matrix (RAM). Control accounts will then be established at these key control points. The Project Manager will identify potential CAMS who could be assigned to one or more of these control accounts. The Project Manager will discuss assignment of the CAMs with their functional manager, who will be responsible for assigning the CAMs to the project team. A single CAM is assigned to each Control Account. The Project Manager, supported by Project Controls, develops for each control account planning guidance including work scope, schedule milestones and deliverables. The Project Manager documents this information on the Control Account Plan/Work Authorization form, and reviews it with the CAM.

4.2 Work Authorization

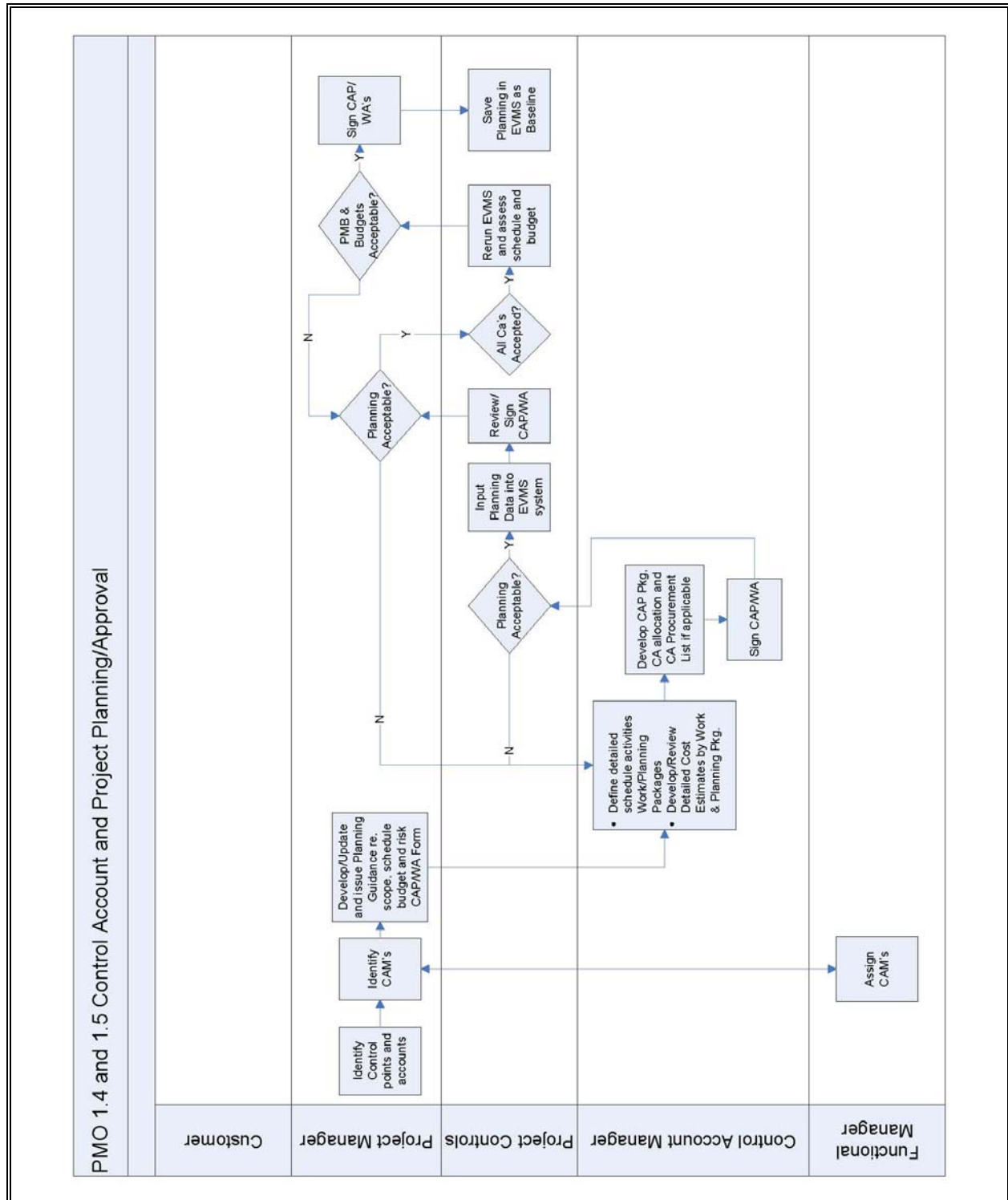
The CAM is responsible for developing detailed schedules and cost estimates for Work Packages and Planning Packages. The CAMs forward these cost estimates to Project Controls for validation using the Control Account Plan/Work Authorization form for each control account. The form includes the relationship to the WBS element or elements, responsible organization identification, control account task description, schedule, and time-phased budget in dollars. The Control Account Plan/Work Authorization is reviewed by the Project Controls Manager and approved by the Project Manager and the CAM to document the delegation of work to the CAM. The approved control account can only be changed with appropriate change control.

5.0 APPENDIX

Appendix A: Control Account and Project Planning/Approval.
Appendix B: Control Account Plan/Work Authorization form.

Title

APPENDIX A: CONTROL ACCOUNT AND PROJECT PLANNING/APPROVAL



Title

APPENDIX B: CONTROL ACCOUNT PLAN / WORK AUTHORIZATION FORM



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Control Account Plan/Work Authorization

Project Title: Molecular Foundry **Summary Project ID:** MF01

Control Account Title: Imaging and Manipulation **Control Acct. Project Id:** ME111

WBS Element: 1.1.1 Imaging and Manipulation

Project Director: J. Krupnick

Control Account Manager: J. Bustillo

Control Account Description: Provide detailed specifications, procurement, installation and testing of the technical equipment as defined in the attached baseline list.

Work Packages: 1.1.1.1 Equipment Purchase
1.1.1.2 Specifications
1.1.1.3 Installation

Control Account Scope: Start Date: October 1, 2004
Completion Date: December 31, 2006
BCWS: See Attached

Control Account Budget: \$3,408,421
Budget Back-Up: See attached Project Budget workbook dated 4/18/05

Milestones/Deliverables: See attached Transition to Operations Schedule

Earned Value Method: Weighted Milestone

Control Account Authorization		
<i>Approved By:</i>		
Project Director:	<u>James Krupnick</u>	<u>Date</u>
Control Account Manager:	<u>James Bustillo</u>	<u>Date</u>
<i>Reviewed By:</i>		
Project Controls Manager:	<u>Michael Barry</u>	<u>Date</u>

Revised Date 7/19/05
Revision # 0